



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Attorney Heather H. Kruthers (for Public Guardian, Conservator of the Estate)

**Petition for Authorization and Instruction as to Management of
Conservatee's Estate Assets (Authority to Invest Funds)**

		PUBLIC GUARDIAN , Successor Conservator of the Estate appointed on 7/5/1995, is Petitioner. <p align="center">~Please Petition for details~</p> Declaration of Deputy Public Guardian Clint Yarbrough Regarding Investment of Assets filed 6/1/2016.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 6/2/2016.</u> <i>Minute Order</i> states continued for review of the late-filed information. <u>Note for reference:</u> Probate Code § 2570(d) for authorization of investments provides the court may require such proof of fairness and feasibility of <i>[the investment]</i> as the court determines is necessary. Probate Code § 2574 provides the conservator, without authorization of court, may invest funds of the estate <i>[in enumerated types of investments, which appear to describe the proposed investment for Conservatee]</i> ; 2574(b) provides that in making the investments, the conservator shall take into consideration the circumstances of the estate, indicated cash needs, and, if reasonably ascertainable, the date of the prospective termination of the conservatorship. The <i>Order Settling Sixteenth Account</i> of the Conservatorship filed 2/1/2016 shows a balance of cash of \$226,946.09 .	
Cont. from 042116, 060216				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input type="checkbox"/>	Not.Cred.			
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<input type="checkbox"/>	Aff.Pub.			
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<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LEG Reviewed on: 6/13/16 Updates: Recommendation: File 1- Hernandez	

DOD: 4-3-99			NEEDS/PROBLEMS/ COMMENTS: <u>OFF CALENDAR</u> First/Final Acct filed 6/9/16 is set for 7/21/16
Cont. from 010314, 40414, 101014, 070915, 111915, 031716			
	Aff.Sub.Wit.		
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	Inventory		
	PTC		
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	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
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	Pers.Serv.		
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	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: skc			
Reviewed on: 6/13/16			
Updates:			
Recommendation:			
File 2 – Martinez			

3 Alexis Cedano, Victor Cedano, Gabriel Cedano, Noah Cedano, Jayden Cedano, Reyna Cedano, Victoria Cedano, Jonah Cedano (GUARD/P)
Case No. 11CEPR00795

Petitioner: Jennifer Cedano (pro per)

Petition for Visitation

		JENNIFER CEDANO , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		RAUL PALLARES, JR. paternal cousin, was appointed as guardian of Noah and Gabriel on 11/16/11	This petition is as to NOAH and GABRIEL only.
Cont. from 040716			Continued from 4/7/16. Minute order states examiner notes handed in open court; continued for proper service as to the guardian and the minors. As of 6/10/16 the following issues remain:
<input type="checkbox"/>	Aff.Sub.Wit.	Please see petition for details.	
<input checked="" type="checkbox"/>	Verified		<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need Proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Raul Pallares, JR. (guardian) b. Noah Cedano (minor) c. Gabriel Cedano (minor)
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 6/14/16
			Updates:
			Recommendation:
			File 3- Cedano

Attorney Catherine A. Amador (for Linda K. Babcock, Conservator of the Estate)

Probate Status Hearing Re: Receipt of Distribution

DOD: 2/22/2014		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>Receipt on Distribution filed 6/6/2016.</i>
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
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<input type="checkbox"/>	Duties/Supp	
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<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
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<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: LEG
		Reviewed on: 6/14/16
		Updates:
		Recommendation:
		File 4- Johansen

Attorney
Attorney

Salazar, Steven F. (for Trustee Steven R. Thomas, II)
Bagdasarian, Gary G. (for former Co-Trustee Kristy Helm Thomas)

Petition for Settlement of First and Final Account, Approval of Trustee Acts and Distribution of Trust Assets and Attorneys' Fees and Costs

DOD: 1/19/12		STEVEN R. THOMAS, II , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 11/1/12 – 2/29/16 Accounting: \$178,342.19 Beginning POH: \$169,217.03 Ending POH: \$107,054.01	<u>Minute Order 5/9/16:</u> The Court indicates that it will not require a special needs trust and that the submitted order should say that the acts are not approved or ratified; continued for direct notice to the minors.
Cont. from 050916			
<input type="checkbox"/>	Aff.Sub.Wit.	Petitioner states Pursuant to Order Approving Settlement Agreement entered 6/25/13, the following parties are entitled to receive a one-eighth share of the trust estate: <ul style="list-style-type: none"> • Steven R. Thomas, II • Kristi Helm-Thomas • Kelby Renee Helm (a minor) • Michael Garrett Davis (a minor) • Steven Ernest Helm, III (a minor) • Steven Rex Thomas (a minor) • Jackson Alan Thomas (a minor) • Alexis Leigh Thomas (a minor) 	<u>Note:</u> All notice and other issues noted have been removed. Proposed order contains language that Petitioner's acts/transactions are not approved.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Preliminary distributions: Pursuant to the settlement agreement, preliminary distributions were made as follows: <ul style="list-style-type: none"> • Kristi Helm-Thomas: \$4,000.00 • Steven R. Thomas II: \$4,816.95 (reimburse for funeral expenses) 	<u>Note:</u> The Court will set a status hearing for <u>Thursday, July 28, 2016</u> for the filing of the receipts for blocked accounts.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Property Disbursed: During administration, Kristi Helm-Thomas and Steven Thomas, II disbursed to themselves or on their behalf and/or retained in their possession certain personal property, which is to be allocated towards their distributive shares as set forth in the petition. (List includes certain inventoried assets, reimbursement for expenses, etc.)	Reviewed by: skc
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		Reviewed on: 6/13/16
<input type="checkbox"/>	Aff.Pub.		Updates:
<input type="checkbox"/>	Sp.Ntc.		Recommendation:
<input type="checkbox"/>	Pers.Serv.		File 5- Thomas
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
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<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

SEE ADDITIONAL PAGES

Page 2

Attorney Salazar: \$10,774.50 (\$10,000.00 plus \$774.50 in costs)

Declaration filed 3/28/16 provides itemization of 82.65 hours @ \$250/hr, totaling \$20,662.50 for services from 1/25/12 to 3/13/16 as attorney for Trustee Steven R. Thomas, II; however, attorney is willing to accept \$10,000, plus \$774.50 in costs.

Attorney Bagdasarian: \$9,563.00 (\$9,362.00 plus \$201 in costs)

Declaration filed 2/16/16 provides itemization of 51.1 hours and separately 23.8 hours @ \$250/hr for services from 2/6/12 through 6/27/13 as attorney for Kristy Helm-Thomas, former Co-Trustee.

Attorney Helon: \$5,535.00 (\$5,100.00 plus \$435 in costs)

Itemization at Exhibit D reflects total fees incurred of \$10,207.65 as GAL for certain minor beneficiaries; however, attorney is willing to accept \$5,100, plus \$435 in costs.

Closing: \$1,500.00**Proposed Distribution:**

- Steven R. Thomas II: \$3,507.81 (\$12,389.89 less advance/retained assets of \$8,882.08)
- Kristi Helm-Thomas: \$1,834.42 (\$12,389.89 less advance/retained assets of \$10,555.47)
- Kelby Renee Helm (minor): \$12,389.88, to be placed into a blocked account
- Steven Ernest Helm, III (minor): \$12,389.88, to be placed into a blocked account
- Michael Garrett Davis (minor): \$12,389.88, to be placed into a blocked account
- Steven Rex Thomas (minor): \$12,389.88, to be placed into a blocked account
- Jackson Alan Thomas (minor): \$12,389.88, to be placed into a blocked account
- Alexis Leigh Thomas (minor): \$12,389.88, to be placed into a blocked account

Pursuant to the Settlement Agreement, and to avoid the expenses of guardianship of the estate, Petitioner requests that the shares of minor beneficiaries be deposited into blocked accounts at EECU subject to withdrawal upon majority. See Amendment filed 5/12/16 for details.

Note: The proposed orders provide for distribution to blocked accounts for the minor beneficiaries, payable when each minor reaches majority, pursuant to the settlement agreement.

SEE ADDITIONAL PAGES

Page 3

Petitioner requests an Order:

1. Finding that all facts stated in the Petition are true and correct and that all notices required by law have been duly given;
2. Finding that the Court has received full disclosure regarding the relationship between Marvin T. Helon, Guardian ad Litem, and Steven E. Helm, III, Steven Rex Thomas, Jackson A. Thomas, and Alexis L. Thomas, minors, and with regard to all matters related to the petition there is no conflict of interest; such Guardian ad Litem has adequately represented the minors as to all matters regarding the Petition; and general family benefits will accrue to the living members if (sic) the family of the minors upon the grating of the Order.
3. That this account and report be settled, allowed and approved, and all acts and transactions of Petitioner relating to matters set forth therein be ratified, confirmed and approved;
4. That the property of the trust estate be distributed as set forth therein;
5. That Attorney Steven F. Salazar for Petitioner/Trustee Steven R. Thomas II be allowed compensation for his services and costs of \$10,774.50;
6. That Attorney Gary D. Bagdasarian for former Co-Trustee Kristy Helm-Thomas be allowed compensation for his services and costs of \$9,563.00;
7. That Attorney Marvin T. Helon, Guardian ad Litem for minors Steven E. Helm, III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, be allowed compensation for his service and costs of \$5,535.00;
8. That the sum of \$12,389.88 to each of the minors, namely, Kelby Renee Helm, Michael Garrett Davis, Steven E. Helm III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, representing each's one-eighth (1/8) share of the trust estate be deposited separately in the name of said minor in an interest-bearing account at EECU in Fresno. No part of the money so deposited shall be withdrawn except on order of the Court until said minor reaches majority, after which all money shall be paid to the minor without further order of the Court;
9. That Petitioner be allowed to withhold \$1,500 from distribution for purposes of paying closing costs of Administration and as a reserve for liabilities of the Trust, with any unexpended portion to be distributed to the beneficiaries in fractional interests without further order of the Court;
10. Terminating the trust and discharging petitioner from his duties and responsibilities as trustee upon acknowledgment of receipt by beneficiaries or on their behalf; and
11. Such other and further orders be made as this Court may deem proper under the circumstances.

Second Account and Report of Trustee of Jennifer Roberts Special Needs Trust; Petition to Settle Account; and for Allowance of Fees to Attorney

			CHRISTINA ROBERTS , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need clarification: Why is the trust being charged an extra \$7.50 bank fee for each court-ordered withdrawal beginning in 2014? 2. On 6/17/15, the Court authorized the beneficiary's share of her father's estate to be distributed to the special needs trust. The Order for Final Distribution entered 7/8/15 in 12CEPR00290 Estate of Michael Roberts authorized distribution of cash and a one-half interest in real property to the beneficiary. This accounting does not reflect receipt of such distribution. Need clarification. Note: If granted, the Court will set a status hearing for the filing of the Third Account as follows: • Thursday, March 1, 2018
			Account period: 11/6/13 – 12/31/15 Accounting: \$233,535.25 Beginning POH: \$233,535.25 Ending POH: \$217,083.52 (cash held in blocked account)	
	Aff.Sub.Wit.		Trustee waives compensation.	
✓	Verified		Attorney: \$3,000.00 (for 12.7 hours @ \$275/hr, less discount, per declaration and itemization at Exhibit B)	
	Inventory		Costs: \$665.50 (filing, certification, per Exhibit C)	
	PTC		Attorney: \$1,661.00 (for legal services associated with the establishment of a conservatorship of the person for the beneficiary, 4.9 hours @ \$275/hr, less discount, plus costs of filing, certification, per declaration and itemization at Exhibit D.)	
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
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	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	2620			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 12/20/13	JOANN DIREDO was appointed Executor with Full IAEA without bond on 7/10/14.	NEEDS/PROBLEMS/COMMENTS:
Cont'd from 091015, 010716	At the hearing on 7/10/14, the Court set this status hearing re the filing of the first account or petition for final distribution.	Minute Order 1/7/16: Counsel represents there is no cash in the estate and the sale has been cancelled; requests 4 months due to impending litigation.
Aff.Sub.Wit.	Note: Final I&A filed 5/29/15 reflects a total estate value of \$2,550,000 consisting of various real property interests.	1. Need first account or petition for final distribution or current written status report per Local Rule 7.5.
Verified		
Inventory		
PTC		
Not.Cred.	Status report filed 9/9/15 states in response to a rejected creditor's claim, David Allen DiRedo filed a Complaint for Breach of Contract Money Had and Received Declaratory Relief on 3/30/15 against the estate. The case is currently in litigation. (Note: See claim filed 8/19/14 for \$106,846.46) In addition, escrow has just been opened on the real property located on West Shaw. Therefore, the estate is not in a condition to be closed. Attorney Fanucchi requests continuation for at least four months to complete the sale and continue with the litigation pending against the estate.	
Notice of Hrg		
Aff.Mail		
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Letters		
Duties/Supp		
Objections		
Video Receipt	Status Report filed 12/8/15 states the complaint filed by David Allen DiRedo in 15CECG01036 is currently in the process of litigation. Regarding the property: Escrow was scheduled to close on 11/30/15; however, due to unforeseen circumstances, escrow was put on hold and the sale is now in jeopardy. The property was taken off the market back in September when the offer was originally accepted and therefore, due to failure of the escrow to close, a new listing and re-marketing has begun.	
CI Report		
9202		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice	Currently the estate is not in a condition to be closed due to the pending lawsuit and the pending sale of the real property. Therefore, it is requested that this status hearing be continued for no less than 4 months to complete the sale and continue the litigation.	

Reviewed by: skc
Reviewed on: 6/13/16
Updates:
Recommendation:
File 8- DiRedo

DOD: 10/20/1999	ROBERT BRUCE STEVER , was appointed as Administrator with full IAEA authority, without bond on 08/14/2014.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 08/15/2014.	
	Final Inventory and Appraisal filed 09/04/2014 shows an estate valued at \$125,000.00.	OFF CALENDAR. <u>Petition for First Account filed 05/31/2016.</u> <u>Hearing is set for 07/07/2016.</u>
Cont. from 101515, 012116	Minute Order of 08/14/2014 set this status hearing for the filing of the First Account and/or Final Distribution.	
Aff.Sub.Wit.	<p>Status Report filed 01/07/2016 states the estate cannot be distributed and closed at this time because the estate does not have sufficient cash and it is the wish of all heirs to sell the property before distributing the estate. It is still the desire of the Petitioner and both of the heirs to sell the real property before distributing the estate, one-third of which will be distributed to the decedent's husband's estate filed under case no. 14CEPR00594. The heirs do not wish to co-own real property. Petitioner has been unable to sell the real property but has repeatedly reduced the price according to the advice of the realtor. Petitioner listed the real property for sale with a broker in March of 2015, for \$428,795 and has reduced the price four times. On approximately January 4, 2016, the price was reduced to \$305,000.00. Petitioner is optimistic that this price reduction will result in an offer. Finally, there is no cash in this estate or the Estate of Robert Stever, sufficient to pay reimbursement to Petitioner for his out-of-pocket expenses paid on behalf of both estates or statutory costs of administration, including the attorney's advanced costs. Petitioner has expended a substantial sum out of his personal funds to have a well drilled on real property in the Estate of Robert Stever for which there is no cash in the estate to reimburse him. The sale of this real property will enable petitioner to proceed with enough cash to pay costs of administration in both estates. Petitioner requests that the Court set another status hearing out at least 120 days.</p>	<p>1. Need First Account or Petition for Final Distribution.</p>
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Duties/Supp		
Objections		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		

10 Robert Benton Stever (Estate)**Case No. 14CEPR00594****Attorney Gleason, Mark J. (for Robert Bruce Stever – Administrator)****Probate Status Hearing re: First Account and/or Final Distribution**

DOD: 03/04/2014	ROBERT BRUCE STEVER , was appointed as Administrator with full IAEA authority, without bond on 08/14/2014.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 08/15/2014.	
	Final Inventory and Appraisal filed 09/10/2014 shows an estate valued at \$508,000.	<u>OFF CALENDAR.</u> <u>Petition for First Account</u> <u>filed 05/31/2016.</u> <u>Hearing is set for</u> <u>07/07/2016.</u>
Cont. from 101515, 012116	Status Report filed 01/07/2016 states the estate cannot be distributed and closed at this time because the estate is to receive distribution from the estate of the Decedent's predeceased spouse, Margaret Stever, which has been filed under case no. 14CEPR00593, heard concurrently with this Report. It is further the desire of the Petitioner and both of the heirs that the Dockery real property be sold during the Probate administration. The heirs do not wish to co-own real property. Based on the information and belief, the deed of trust issue raised in the prior status report filed in this matter will be resolved during escrow proceedings upon the sale of the Dockery property. Further, the existing well on the Dockery property went dry and it was necessary to dig a new well, which is now complete. The real property needs to be sold to pay the costs of the new well and the costs of administration. Petitioner requests that the Court set another status hearing out at least 120 days.	
Aff.Sub.Wit.		
Verified		
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PTC		
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Notice of Hrg		
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Objections		
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Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 06/14/2016
		Updates:
		Recommendation:
		File 10 – Stever

Probate Status Hearing RE: Filing First Account

		<p>PUBLIC GUARDIAN was appointed as Conservator of the Estate on 1/15/15.</p> <p>At the hearing on 1/15/15, the Court set this status hearing for the filing of the first account.</p> <p>Status Report filed 2/19/16 states the Public Guardian is short-staffed and therefore requests continuance for at least 90 days.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account pursuant to Probate Code §2620 or current written status report per Local Rule 7.5.</p>
Cont. from 031016			
	Aff.Sub.Wit.		
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	Letters		
	Duties/Supp		
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	Video Receipt		
	CI Report		
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	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: skc</p> <p>Reviewed on: 6/13/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11- Skopec</p>

13 Michael Daniel Lutz (Estate) Case No. 15CEPR00667**Attorney Rindlisbacher, Curtis D. (for John F. Lutz – Executor)****Probate Status Hearing RE: Filing of the Inventory and Appraisal**

DOD: 4/18/15	JOHN F. LUTZ , Brother, was appointed Executor with Full IAEA without bond on 08/13/2015.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 04/07/2016: Counsel represents that the inventory is completed; requests 60 days for appraisal of several properties. No appearance is necessary at the status hearing if the Inventory and Appraisal is filed a least two Court days prior. 1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 8/13/15.	
Cont. from 040716	Minute Order 02/11/2016 set this Status Hearing for filing of the Inventory and Appraisal. Minute Order 02/11/2016 states the Order to Show Cause is vacated. No appearance is necessary at the status hearing if the Inventory and Appraisal is filed at least two court days prior.	
Aff.Sub.Wit.		
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CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 06/14/2016
		Updates:
		Recommendation:
		File 13- Lutz

Attorney Susan K. Arthur (for Petitioner Florencio Levario)

Petition to Determine Succession to Real Property and Personal Property

DOD: 12/29/2015	FLORENCIO LEVARIO , brother, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: Continued from 5/9/2016 per request of counsel. Note: Amended Attachment 14 filed 6/10/2016 lists the name and date of death of Decedent's spouse as LUPE LEVARIO deceased on <u>9/11/1998</u> , while the <i>Declaration of Clerical Error</i> filed 6/10/2016 lists the date of death of sister-in-law LOLA OROSCO also as <u>9/11/1998</u> . However, the <i>Petition</i> contains a hand-written date of death of <u>6/29/1977</u> , apparently for Decedent's spouse, LUPE LEVARIO . Court may require confirmation of the dates of death of these two persons.
	40 days since DOD.		
	No other proceedings.		
Cont. from 050916			
<input type="checkbox"/> Aff.Sub.Wit.	<input type="checkbox"/> S/ <input type="checkbox"/> P		
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
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<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
I & A - \$117,500.00 Will dated 2/7/1991 devises the residue of the estate to the Petitioner. Petitioner requests Court determination that Decedent's 100% interest in real property located at 1401 Hoag Street, Sanger, and Decedent's 100% interest in personal property, passes to the Petitioner pursuant to Decedent's Will.			
Reviewed by: LEG Reviewed on: 6/13/16 Updates: Recommendation: File 15- Levario			

Attorney: Zepure "Zeppy" Attashian (for Petitioner, Michelle Ryan)

Attorney: Leigh W. Burnside (for proposed conservatee Renata Swanson)

Petition for Appointment of Probate Conservator of the Person and Estate

		MICHELLE RYAN , daughter, is petitioner and requests appointment as conservator of the person and estate	NEEDS/PROBLEMS/COMMENTS:
			Court Investigator Advised Rights on 6/7/16.
Cont. from 051916		Please see petition for details.	1. Need Citation
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Court Investigator Report filed on 6/9/16	2. Need proof of personal service of the Citation along with a copy of the petition on Renata Lina Swanson.
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		3. Notice of Hearing on all relatives within the 2 nd degree was not sent with a copy of the petition as required.
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		4. Petition requests 2690 powers without listing which powers are being requested and why. Local Rule 7.15/2.
<input checked="" type="checkbox"/>	Aff.Mail	W/O	
<input type="checkbox"/>	Aff.Pub.		5. Petitioner is requesting no bond or reduced bond. Petitioner states she does not have the financial means to obtain a bond as required by Probate Code §2320 or C.R.C. 7.207(c). if bond is required it should be set at \$2,272,800.00.
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		6. Order is incomplete. Need new completed order.
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		Please see additional page
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		Reviewed by: KT
<input checked="" type="checkbox"/>	Video Receipt		Reviewed on: 6/14/16
<input checked="" type="checkbox"/>	CI Report		Updates:
<input type="checkbox"/>	9202		Recommendation:
<input checked="" type="checkbox"/>	Order		File 16- Swanson
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, July 27, 2016** at 9:00 a.m. in Department 303, for the filing of the bond, if required.
- **Wednesday, October 26, 2016** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, August 23, 2017** at 9:00 a.m. in Department 303, for the filing of the first account. \

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 6/1/16 Voting rights affected – need minute order.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/14/16	
			Updates:	
			Recommendation:	
			File 19- Kim	

Petition to Determine Succession to Real Property

DOD: 11/16/07		<p>PATRICK W. ENRICO, Trustee of the John D. Enrico 1989 Living Trust, is Petitioner.</p> <p>40 Days since DOD</p> <p>No other proceedings</p> <p>I&A: \$142,500.00 (a 50% separate property interest in certain real property in Firebaugh)</p> <p>Will dated 12/28/93 devises residue of estate to the Trustee of the John D. Enrico 1989 Living Trust.</p> <p>Petitioner requests Court determination that the decedent's 50% separate property interest in certain real property in Firebaugh passes to him as Trustee of the John D. Enrico 1989 Living Trust pursuant to the decedent's will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	Aff.Sub.Wit.			S/P
✓	Verified			
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 6/14/16</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 20- Enrico</p>	

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/ COMMENTS: 1. Need continuance for advisement of rights and investigation per Probate Code §§ 1823, 1826. 2. Need video receipt per Local Rule 7.15.8.A.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt	X		
	CI Report	X		
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 6/14/16	
			Updates:	
			Recommendation:	
			File 21- Brown	

Attorney Robirda M. Lyon (for Petitioners Phyllis Taylor and Barbara Ester, daughters)

Petition to Determine Succession to Real Property

DOD: 11/18/1991	PHYLLIS TAYLOR and BARBARA ESTER, daughters, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: 1. Item 9(a) of the <i>Petition</i> is incomplete as to (3) re: issue of a predeceased child.
Cont. from	40 days since DOD.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	No other proceedings.	
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	I & A - \$35,000.00	
<input type="checkbox"/> Notice of Hrg	N/A	
<input type="checkbox"/> Aff.Mail	Decedent died intestate.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioners request Court determination that Decedent's 100% interest in real property located at 657 W. Parlier, Reedley, passes to the Petitioners at 50% to each pursuant to intestate succession.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LEG
		Reviewed on: 6/14/16
		Updates:
		Recommendation:
		File 22- Bailey

Petitioner James Calvin Bussey, Jr. (Pro Per, son)

**Petition for Letters of Administration; Authorization to Administer
Under the IAEA with Full Authority**

DOD: 9/18/2014		JAMES CALVIN BUSSEY, JR. , son, is Petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Confidential Supplement to Duties and Liabilities of Personal Representative</i> form, pursuant to Local Rule 7.10.1 and Probate Code § 8404. 2. Item 5(a)(2)(b) of the <i>Petition</i> states Decedent's spouse is deceased. Item 8 of the <i>Petition</i> does not include the name and date of death of deceased spouse pursuant to Local Rule 7.1.1 (D). Note: If the <i>Petition</i> is granted, Court will set status hearings as follows: <ul style="list-style-type: none"> Wednesday, November 16, 2016 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and Wednesday, August 16, 2017 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			Full IAEA — OK
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			Decedent died intestate.
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			Residence — Fresno Publication — Business Journal
<input checked="" type="checkbox"/>	Aff.Mail	W/		
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.	Estimated value of the Estate: Real property — \$12,533.00 <i>(encumbered)</i> <hr/> Total — \$12,533.00 Probate Referee: Steven Diebert		
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp		X _(supp)	
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			